

CaseManagerPro by Lucid IQ

CaseManagerPro (CMP) promotes practice effectiveness by supporting well-defined practice management and standards.

CMP is browser-based case and matter management software (C/MMS) that manages key practice system components – data, documents, people, processes and production – to align with objectives.

It improves productivity and results using a variety of practical features and diverse tools that keep relevant information current and readily accessible.

CMP Background

Lucid IQ was engaged to systemize four mass-tort litigation practices in 1999 - 2000.

CMPv1

The original objective of CMP was to manage all mass-tort practice data for the greatest possible accuracy and efficiency.

Data Quality: Database Design

CMP's relational depth and sophistication in SQL-Server resolved major management deficiencies for mass tort data in C/MMS.

Control: Information Management

Configurable data, processes and reporting facilitated practice standards and presented information for specific practice needs.

Information Access: User Interface

The browser interface enhanced access and lowered IT overhead. Access to information via related records, processes and reports improved productivity and responsiveness.

Early Deployments

The data-rich, high volume, process-driven environment proved to be an ideal C/MMS prototype. Practice and design elements of mass tort were clearly extensible to other practices, as were the benefits.

The first four CMP clients averaged 250 users with tens of thousands of data and document-intensive plaintiffs and cases.

CMP was applied to Multi-District Litigation (MDL) in 2004, including major toxic tort defense by national lead and 40+ local law firms, now with over 200,000 cases.

All of these practices are still CMP managed.

Software Evolution

CMPv1 was the first of three generations of the browser-based C/MMS designed and developed by Lucid IQ.

CMPv2 was designed to better adapt to case and matter types other than mass-tort. Admin Tools were greatly expanded to give clients more autonomy and system control.

- Context-based content
- Workflow automation
- "List Query" reporting

CMPv3's graphical interface simplifies use and increases adoption among non-tech users, especially managers.

- Navigation panel for Browse and Search
- Home page for key links and information
- Related records links for easy access
- Action menu for common actions
- Reporting and calendar management

Clients benefit from active engagement by attorneys and lower demands on support staff, making each team member better informed and more productive.

Information Management

Depth and adaptability of CMP's C/MMS platform, web-access, search and reporting tools, business process management (BPM) assures data quality and ready access to information fit to the job at hand.

Admin Tools

With the exception of data migration, most deployments use only Admin Tools to set up and maintain CMP for their practice.

Admin Tools provide administrators access to the array of controls to manage CMP to meet practice demands.

Lucid IQ clients are directly involved in the implementation process, quickly gaining the skills to manage CMP with little support.

Data Records

The variety and capacity of records allow CMP to adapt to specialized requirements.

Most CMP data records support many-to-many relationships with other record types.

Primary Records

Primary records retain data for the core objects of the practice and C/MMS; cases, contacts, documents and calendar entries.

Secondary Records

Secondary records represent data objects managed independently to support multiple instances or relationships, related content and meet other data or practice objectives.

Contextual Custom Data Content

Admin Tools allow Data Sections to be configured and criteria to be set to trigger their insertion for most data records.

Eight records have similar functions to create and insert Workflow processes.

Workflow Process and Calendars

Calendar entries are created ad hoc or by CMP using Key Date and BPM/Workflow features configured with Admin Tools.

Business Process Management/Workflow

BPM features create standard processes to manage tasks and scheduled due dates and assignments per defined criteria.

Full BPM features are available in contact, case and document records as well as five secondary records.

- Trigger entries per criteria relative to other process entries, actions (e.g. new record added), or Key Dates.
- Assignments made by person or role, by team or individually.
- Decision entries allow selection of outcome-based alternative processes.

Key Dates

Key Dates are predefined events or milestones that are part of the Workflow interface. They can be manually entered or triggered by actions or other Key Dates.

Configurable Calendars and Reports

Calendar entries are available in reports and purpose-specific calendars.

Calendar criteria define the entries to be included based on record source, entry type, assignees, etc. to address group, job or management needs.

CMP delivers daily updates and synchs bi-directionally with Outlook. Calendar entries combine with related content in reports to effectively manage work and the practice.

Document Management

DMS is integral to CMP so related case, contact and other data lend context for effective search, report and navigation.

Processed files reside in Document Profiles, with context-based content and Workflow.

Uploading Files

Browse/select to upload files or right-click Windows files. CMP's Batch Upload utility streamlines volume uploads.

Text Extraction

Text is extracted from uploaded files and indexed for Full Text Search (FTS).

Document Profiling – Systemized Processing

Files can be profiled as they're uploaded or queued to profile later in batches or singly.

The Batch Profiler is used to systematically assign profilers and track files. Authorized users can search and select files to process.

Document File Search

Document search functions use related record content to narrow result sets. FTS returns a preview of highlighted "hits" on search terms with surrounding text.

Document File Links, Options

Document files are listed with links to the Document Profile, the native file, or to open the file with CMP's HTML5 Content Viewer.

HTML5 Content Viewer

The HTML5 viewer is a server-based app that renders 300+ file types in native form via browser for most devices. The viewer also includes review and production tools.

Predictive "Auto-Coding"

Lucid IQ is in the process of integrating a predicative coding application developed for complex, high-volume health-care data. Scheduled for prototype release Q1 2016.

Reporting

Reports are critical to fulfilling practice objectives by improving performance at every level with use-specific information.

CMP's List Query report generator provides detailed, easily managed reports. The SQL-Server database is also open to query for other reporting tools and custom reports.

CMP List Queries

Record content from all record types is reportable including custom data, workflow and calendar items as well as related data.

List Queries create reports from detailed user input. Report columns are defined by source record and field, and criteria are set when the report is created or when it's run.

Use of Reports

Better information improves performance, whether for handling routine activities or managing major operations.

Reports are used to streamline production, reduce error risk, manage personnel, track compliance, report activity, supervise and manage case portfolios, automate retention policies, and for many other purposes.

Report management further enhances use:

- User security manages report content
- Reports are output in multiple file types
- HTML reports link to the resulting records
- Run-time criteria allow quick refinement and lower accessibility barriers
- Calendar data provides status, insight and streamlines Workflow management